

Kakenmaster & Associates SecureFilePro Connect Instructions

This document includes instructions for:

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- II. New Users: Setting up your SecureFilePro Connect Account (page 2)
- III. Setting up Two-Factor Authentication for existing and new users (page 4)
- IV. Submitting Your Tax Documents and Initiating the Completion of Your Return (page 7)
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- VI. Signing the Signature Documents Required for Electronic Filing (page 12)
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Questions?

If you have any questions, please contact our office by phone at 847-367-0888 or by email at taxpreparation@kakenmaster.com.

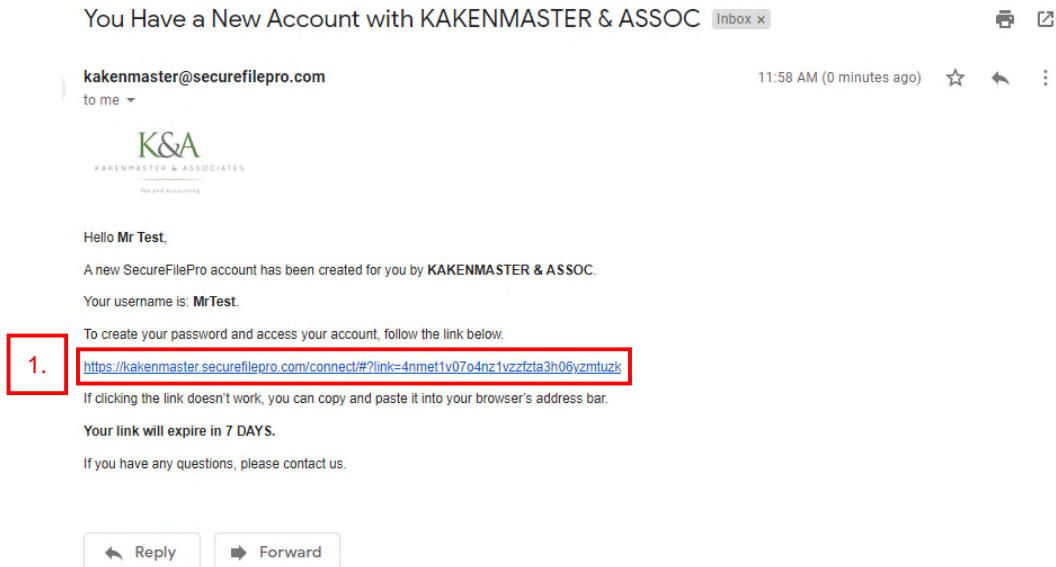
I. Existing Users: Accessing your SecureFilePro Connect Account

1. Go to the Kakenmaster & Associates SecureFilePro Connect site:
<https://kakenmaster.securefilepro.com/connect/#/login>
2. Enter your Username and Password and click "Login"
 - a. Your Username is in the format "FirstnameLastname" (no spaces and not case sensitive). If you need to know your Username, contact Kakenmaster & Associates.
 - b. If you have forgotten your password, use the "Forgot Password" link to initiate a reset or contact Kakenmaster & Associates.

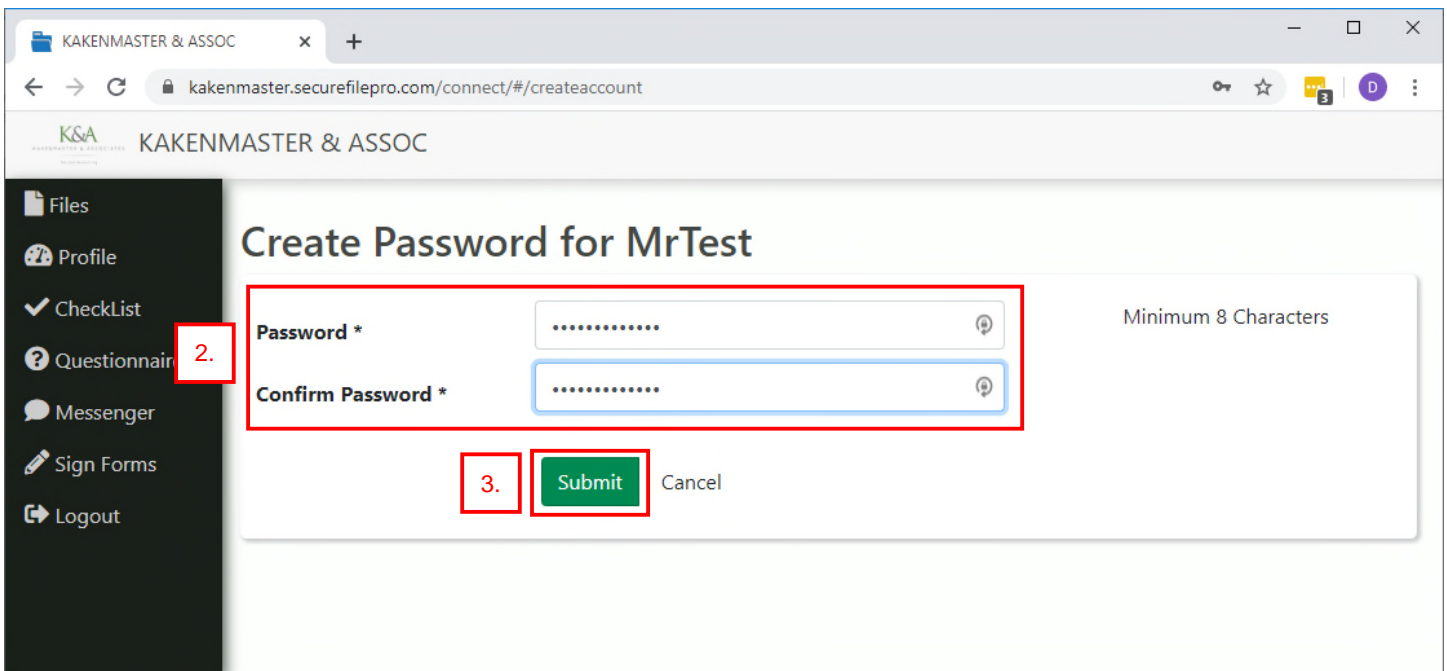
The screenshot displays the login interface for Kakenmaster & Associates. The browser address bar shows the URL kakenmaster.securefilepro.com/connect/#/login?un=MrTest. The page features a dark sidebar on the left with navigation links: Files, Profile, CheckList, Questionnaire, Messenger, Sign Forms, and Logout. The main content area is titled 'Login' and contains two input fields: 'Username' with the value 'MrTest' and 'Password' which is masked with dots. A red box highlights the 'Forgot Password' link, with the label '2b.' next to it. Below the password field is a green 'Login' button. At the bottom of the form, there are links for 'Terms of Use' and 'Privacy Policy'.

II. New Users: Setting up your SecureFilePro Connect Account:

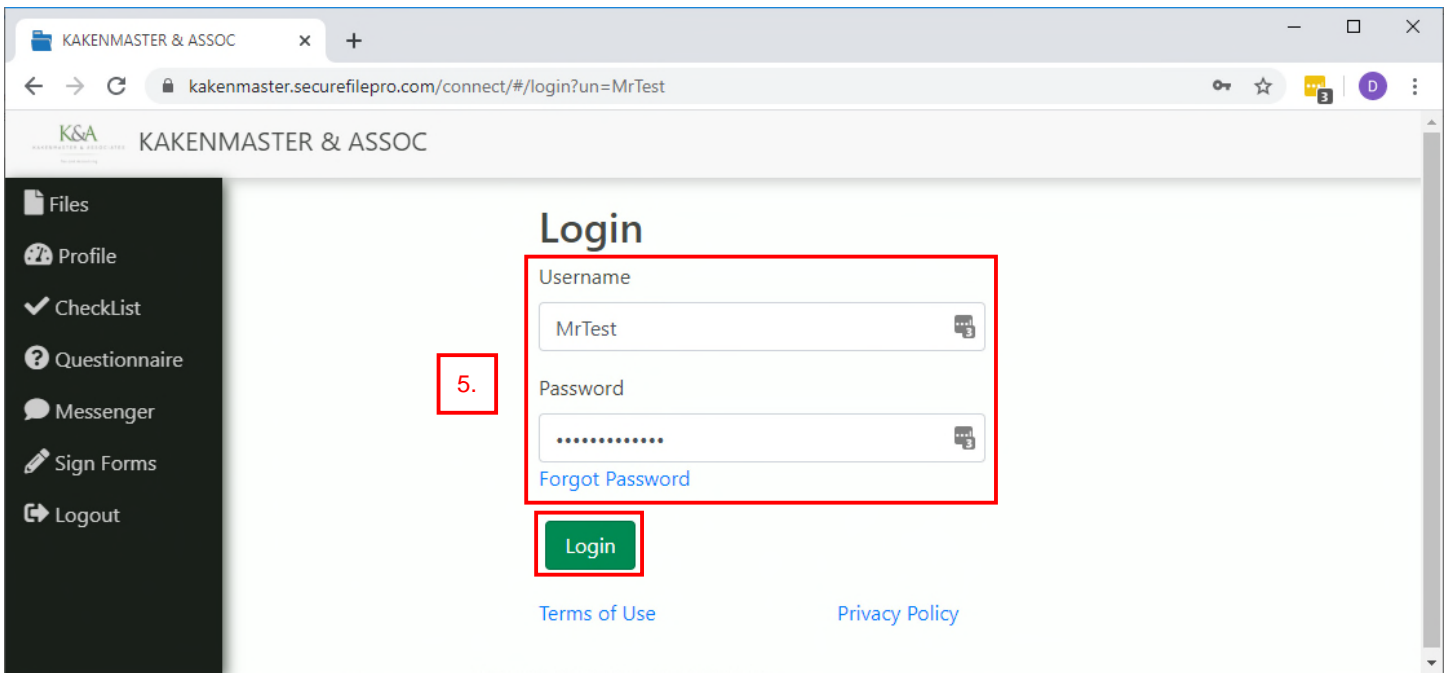
1. Please contact Kakenmaster & Associates to request an account. You will receive an email from kakenmaster@securefilepro.com with the subject "You Have a New Account with KAKENMASTER & ASSOC". Click the link provided in this email to create your password and access your account.



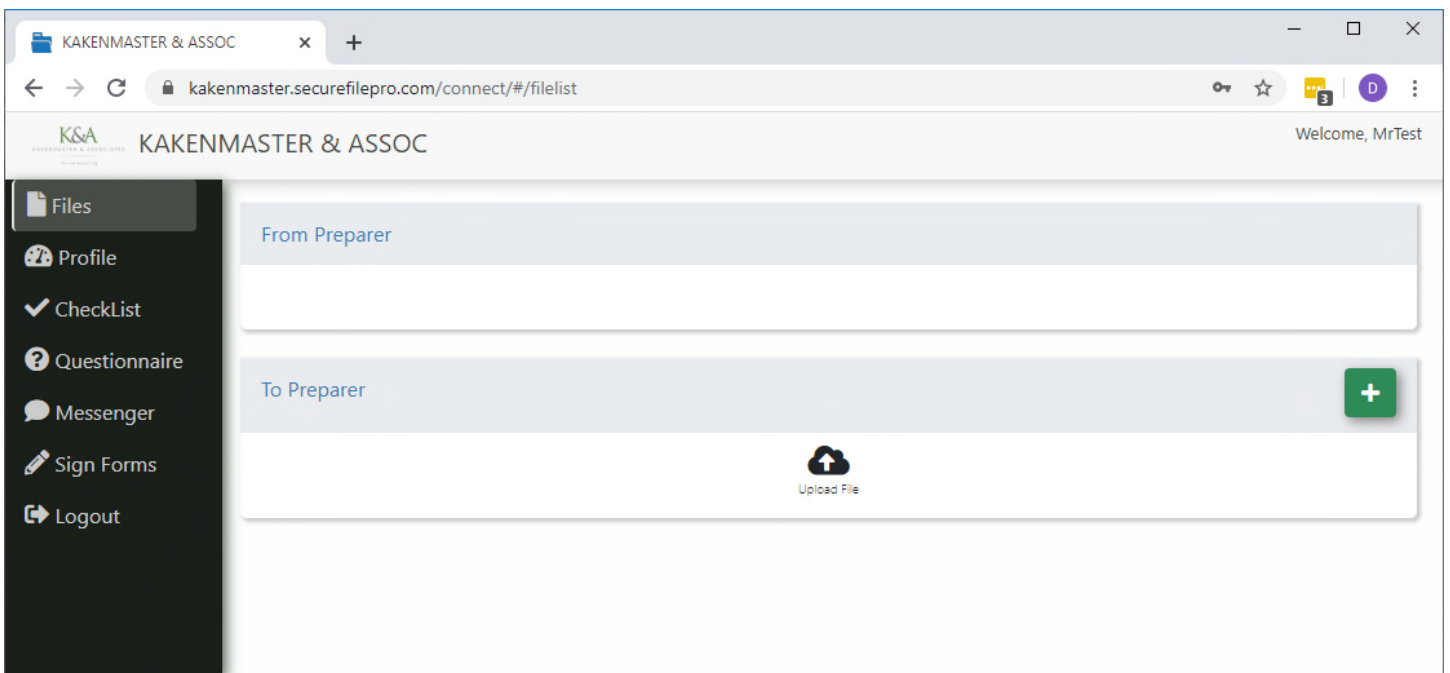
2. Create a password for your account and confirm the password. The password must be 8 characters long and it is recommended that it contain an upper case letter, a lower case letter, a number, and a special character (such as !, #, \$).
3. Click the Submit button.



4. The **Login** screen displays. Enter your username and password and click the **Login** button.



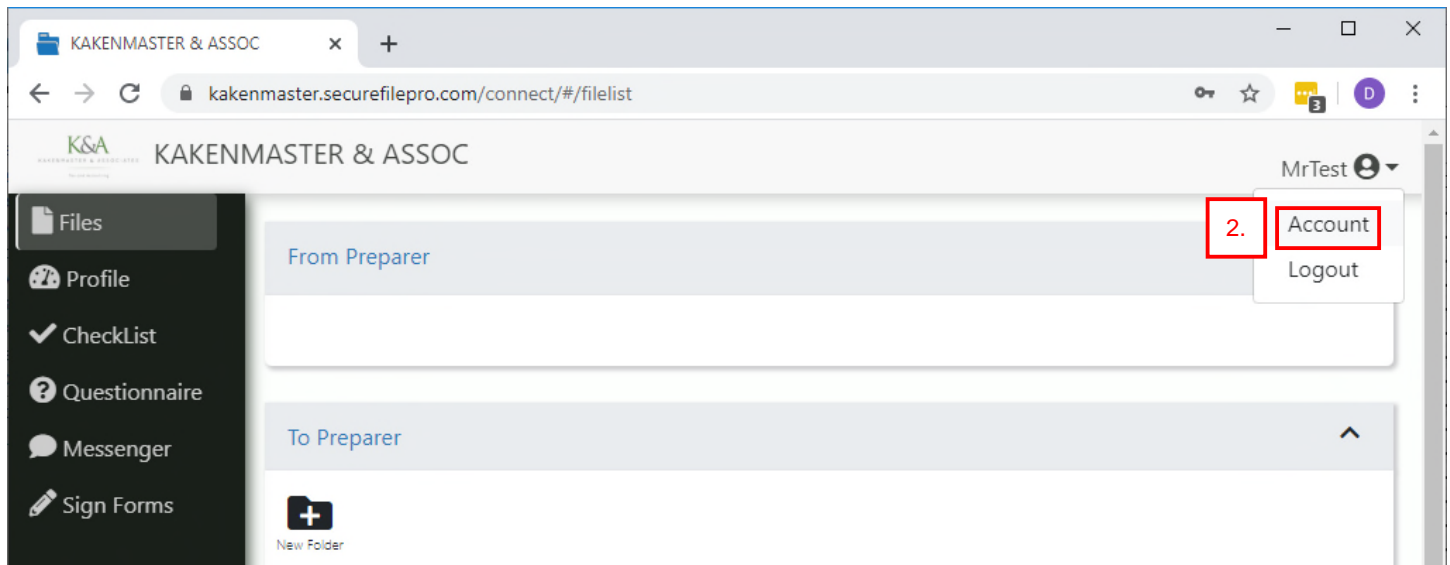
5. The **Files** page will display.



III. Setting up Two-Factor Authentication for existing and new users

Note: Two-Factor Authentication is a new option for SFP users in 2020. It is not required, but is recommended, as it adds an additional layer of security the client portal. If you are unable to log in, or lose your cellular device, please contact our office for assistance with resetting the SFP password and MFA.

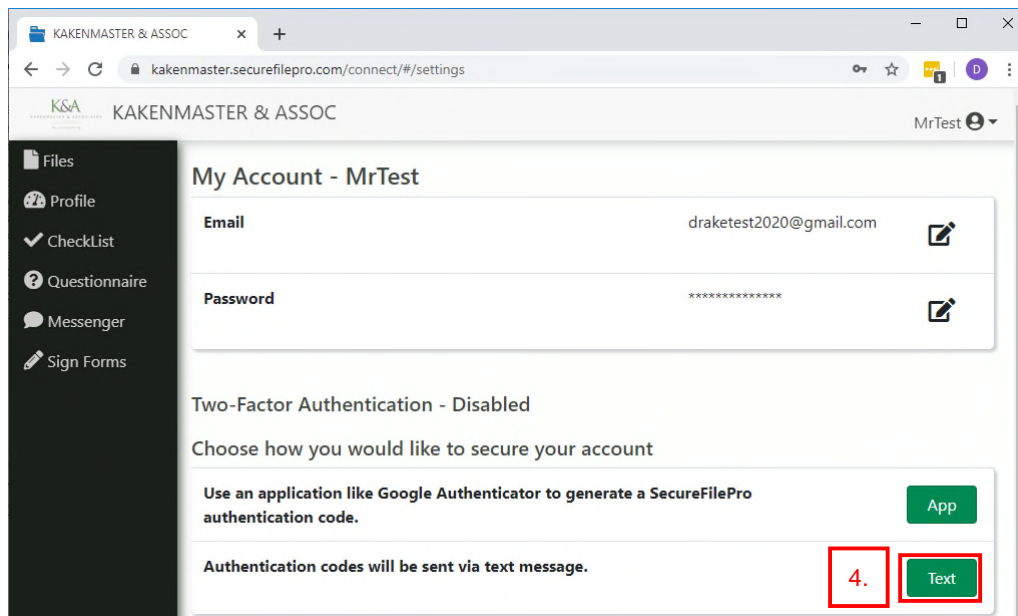
1. Login to SecureFilePro at <https://kakenmaster.securefilepro.com/connect/#/login>
2. Click the **username icon** in the upper right-hand corner and select **Account**.



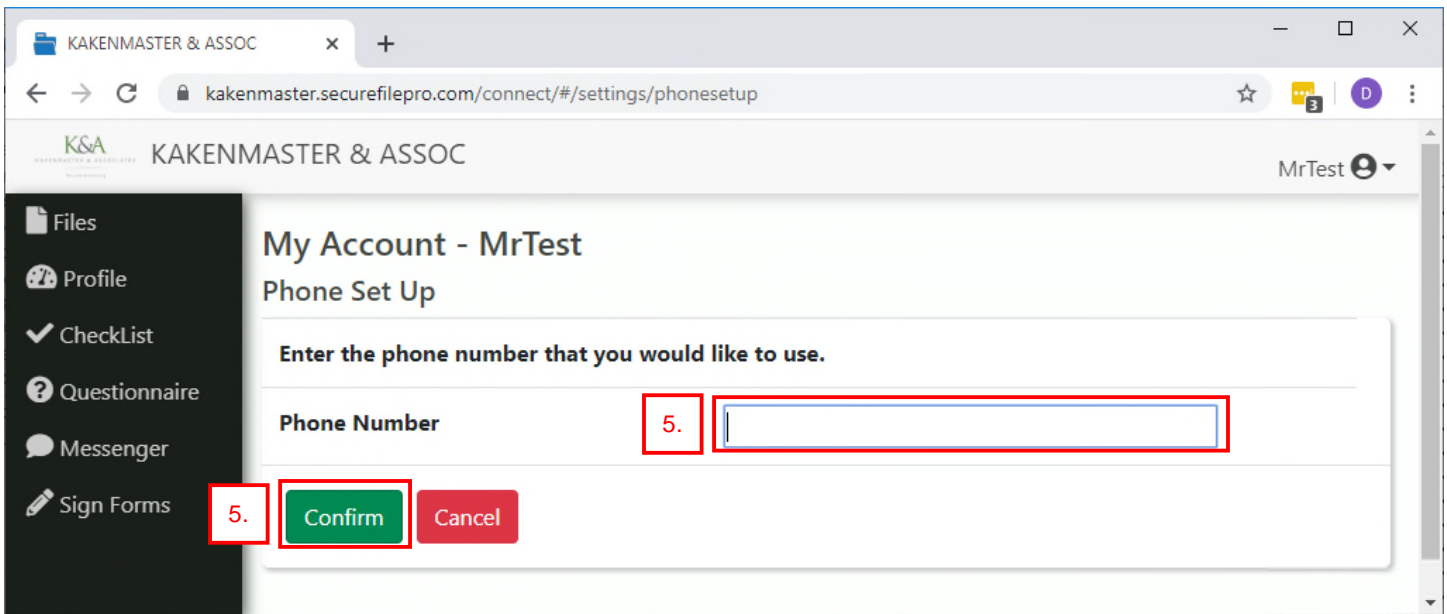
3. Choose from Text Message Authentication (option 1 below) or App Generation (option 2 below). Test Message Authentication will send an authentication code via text message. App Generation requires the use of a phone application like Google Authenticator or Authy to generate an authentication code. If you do not already use an authenticator app on your phone, select Text Message Authentication.

Option 1: Text Message Authentication (Steps 4-7)

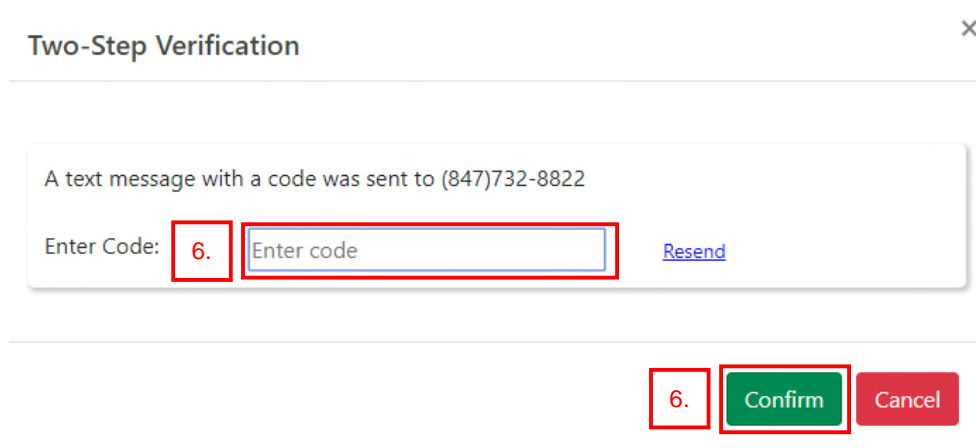
4. For Text Message Authentication, choose **Text** under the Two-Factor Authentication section.



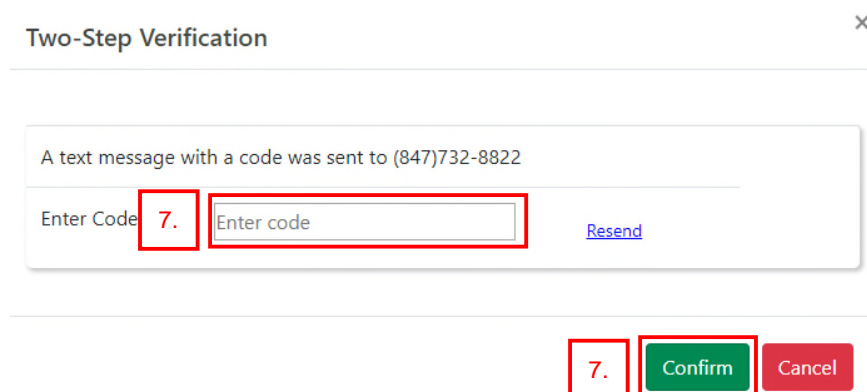
5. Enter your phone number and click Confirm.



6. You will receive a six-digit code via text message (standard text messaging rates apply). Enter that code on the Two-Step Verification window and click **Confirm**.

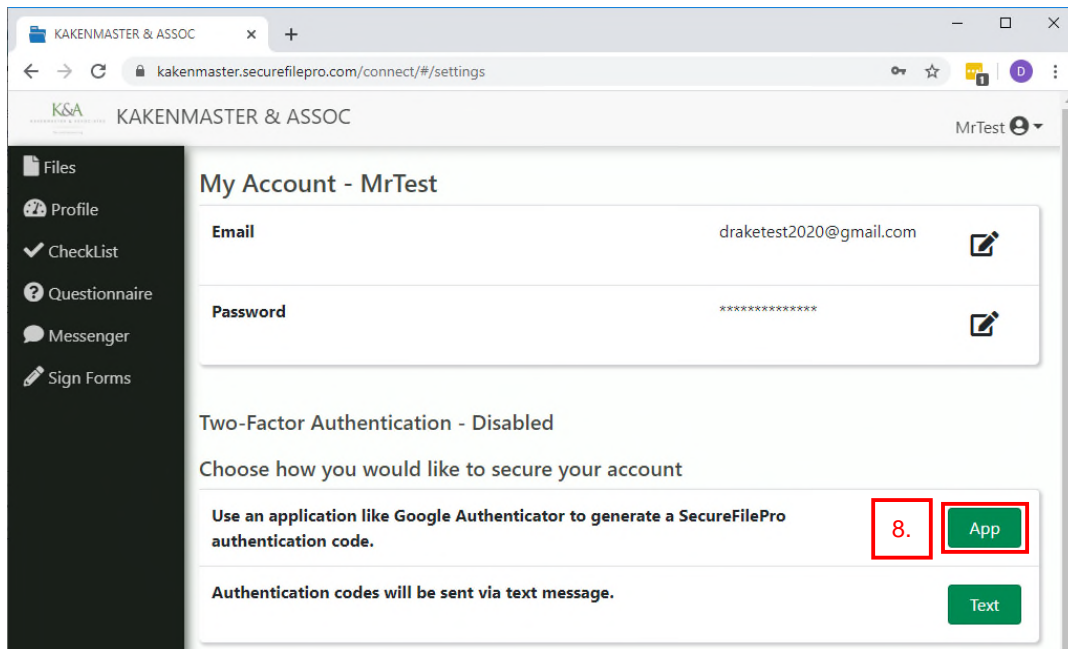


7. Once the two-factor authentication has been enabled, the user will need to use both their chosen password and the six-digit code received via text message before they will be able to log in to their SFP account. After the six-digit code is entered, click **Confirm**.



Option 2: App Generation Authentication (Steps 8-11)

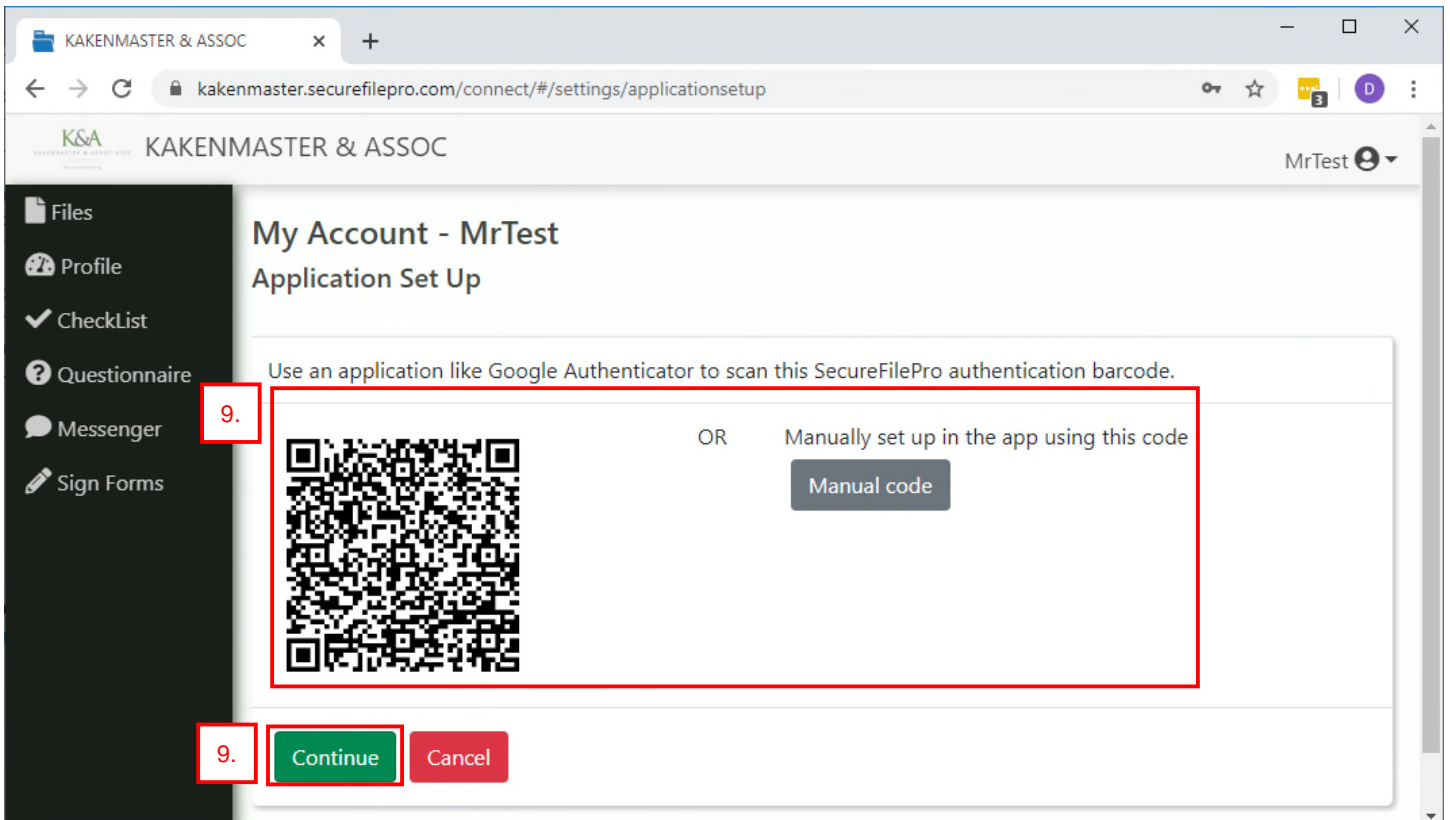
8. For App Generation Authentication, choose **App** under the Two-Factor Authentication section.



9. Using your cellular device, link the app to the SFP account by completing one of the following:

- Scan the authentication barcode (QR code), or
- Click Manual code to set up the app with a code.

Then click **Continue**.



10. Follow the app specific steps to activate the app. The app will display a six-digit code. Enter that code on the Two-Step Verification window and click Confirm.

Two-Step Verification

Enter the six-digit code from the application after scanning the barcode or entering the manual code.

Enter Code: 10.

10. Confirm Cancel

11. Once the two-factor authentication has been enabled, the user will need to use both their chosen password and the six-digit code generated by the app before they will be able to log in to their SFP account. After the six-digit code is entered, click Confirm.

Two-Step Verification

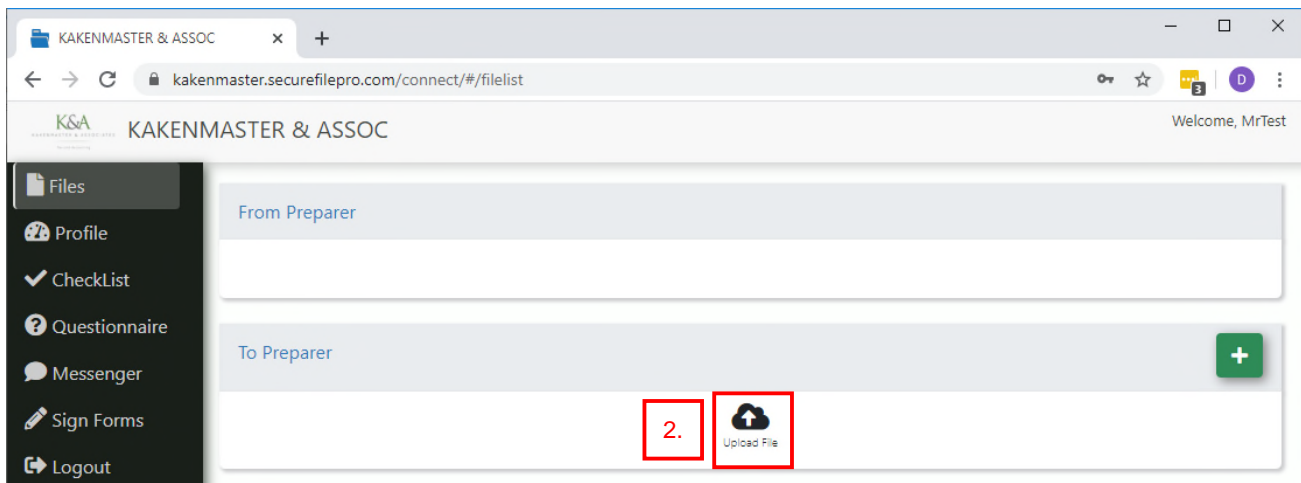
Enter the Code from your Authenticator App.

Enter Code: 11.

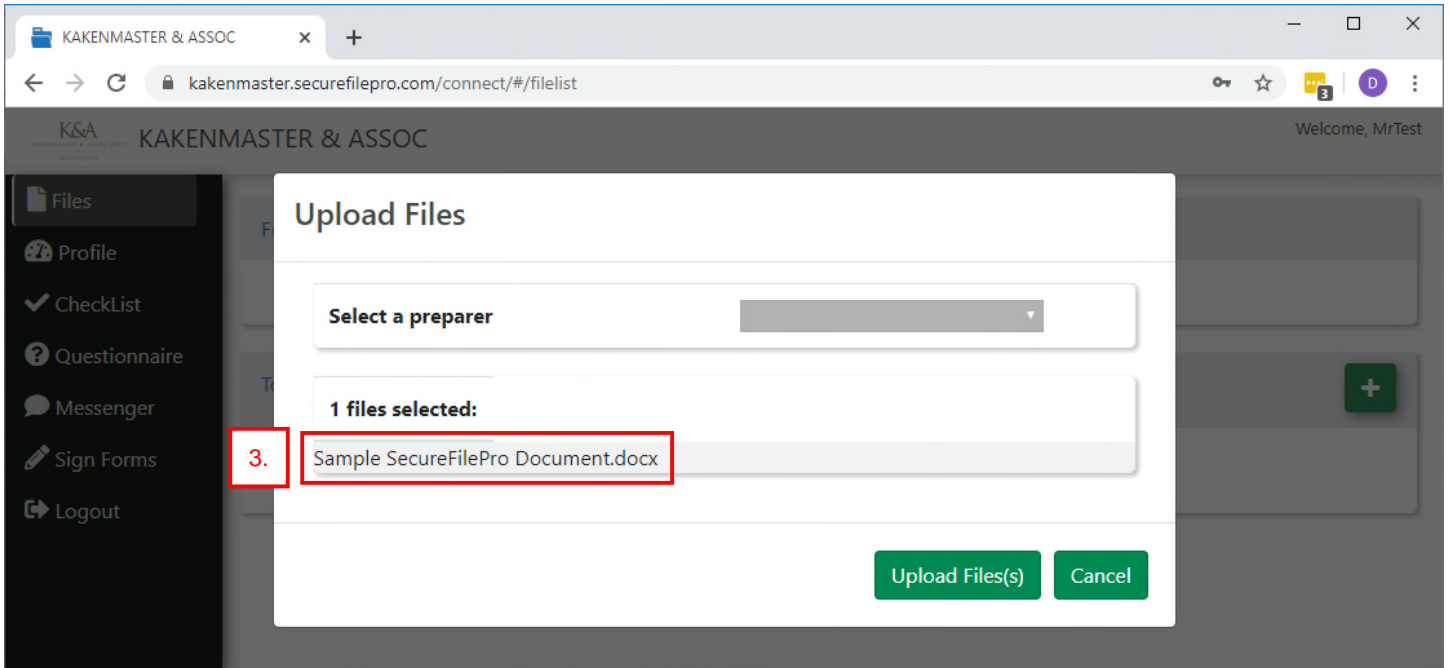
11. Confirm Cancel

IV. Submitting Your Tax Documents and Initiating the Completion of Your Return:

1. Login to SecureFilePro at <https://kakenmaster.securefilepro.com/connect/#/login>
2. Click the **Upload File** button under the **To Preparer** section. An **Open** window will open.

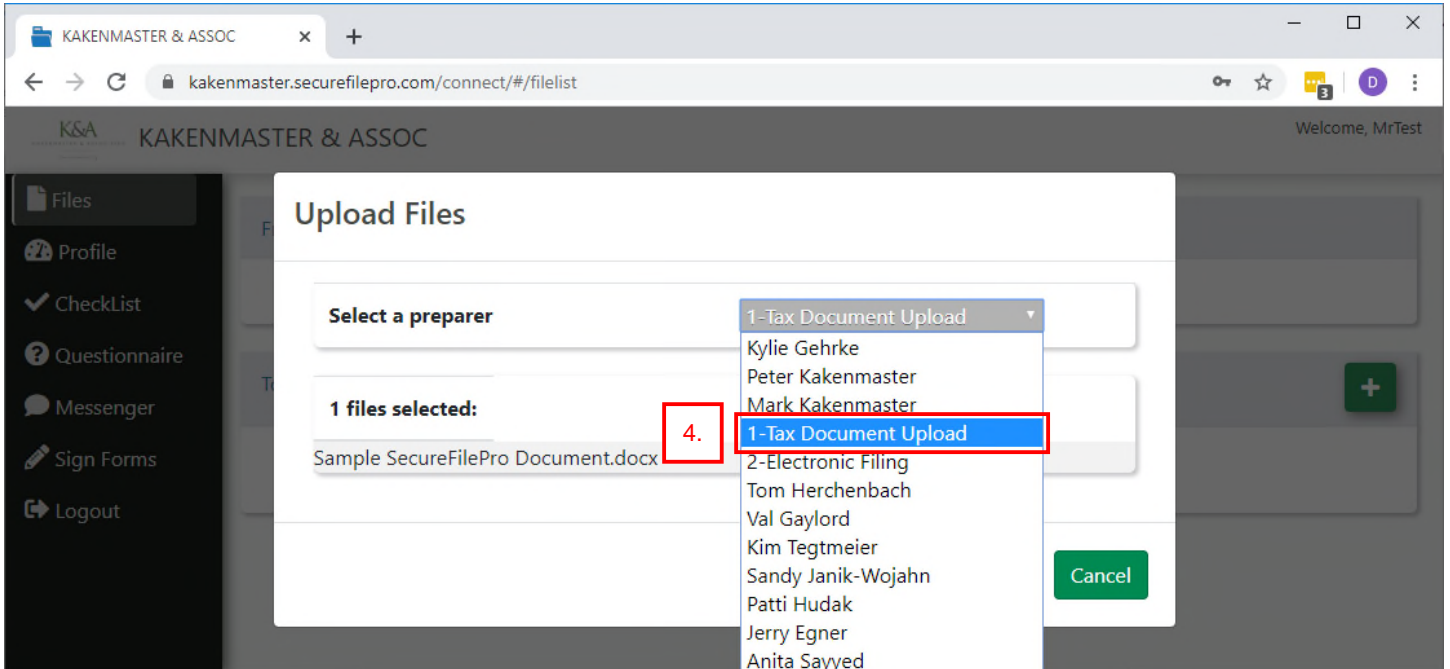


3. Navigate to the file(s) you would like to upload. Multiple files can be selected at one time by holding down the 'Ctrl' button. The selected file will be shown in the **Upload Files** screen under the **files selected**.

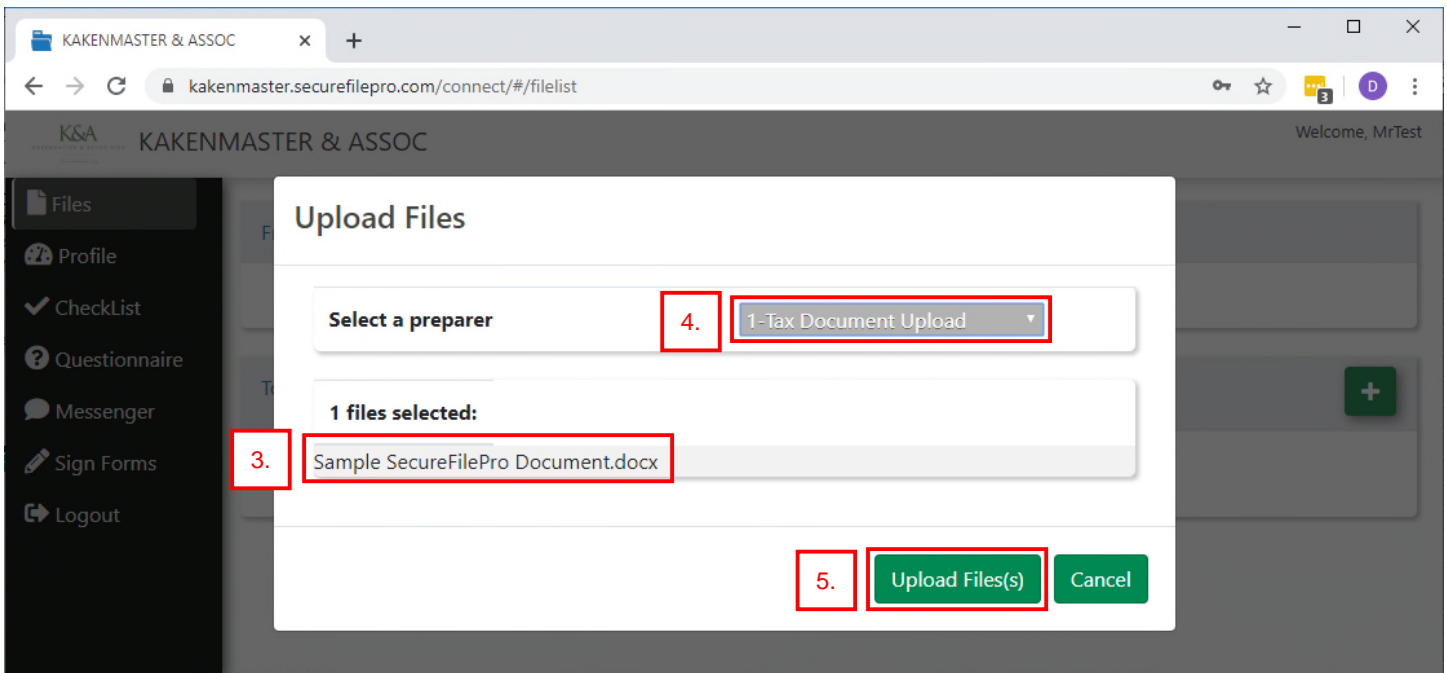


4. Use the **Select a preparer** drop down menu and select **1-Tax Document Upload***.

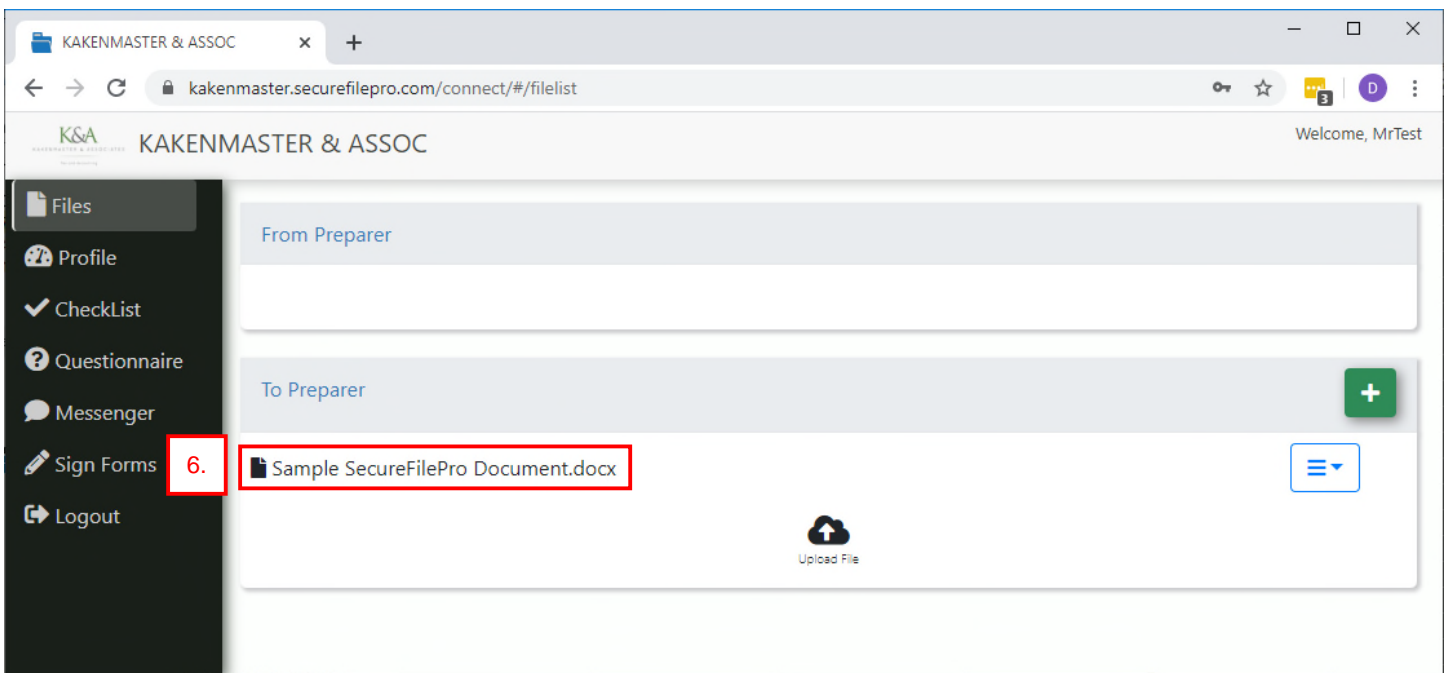
***Note: Please upload your tax documents once you have received all forms required to complete your return.**



5. Click the **Upload File(s)** button.



6. The uploaded file will display in the center window.

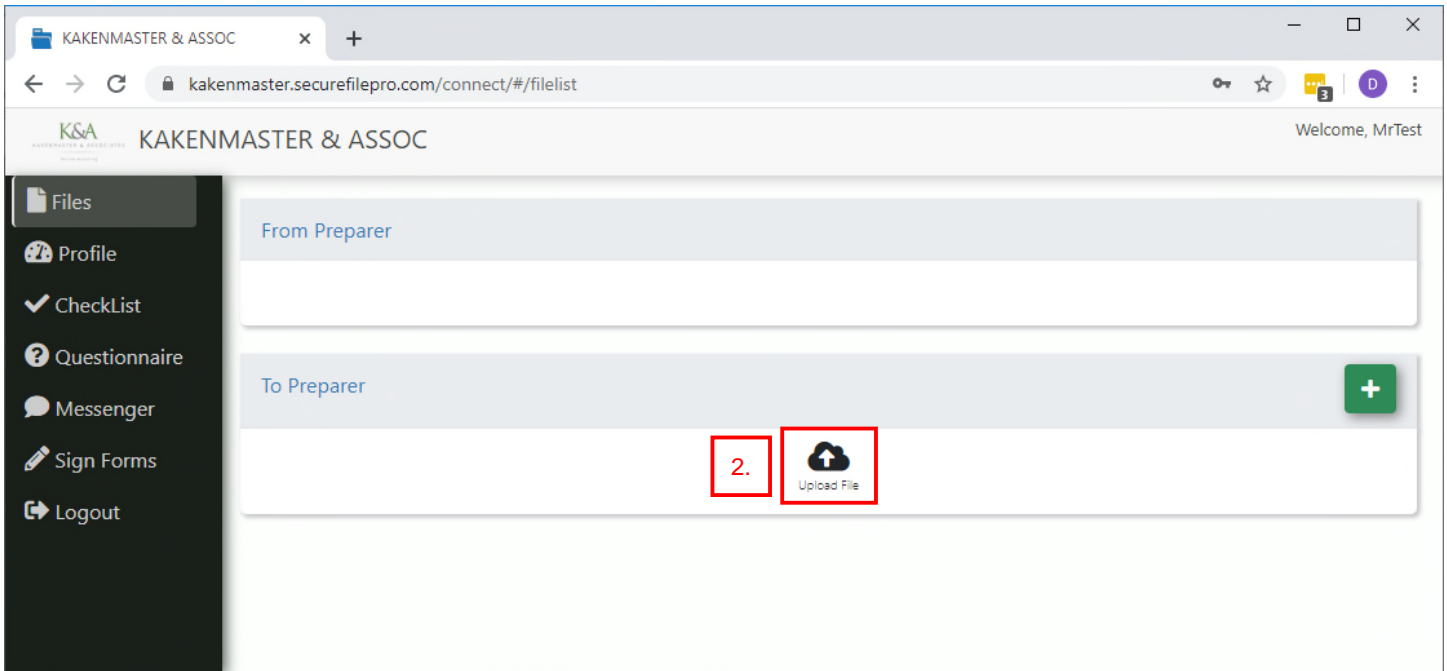


7. Our office will be notified that your tax return file is ready to begin.

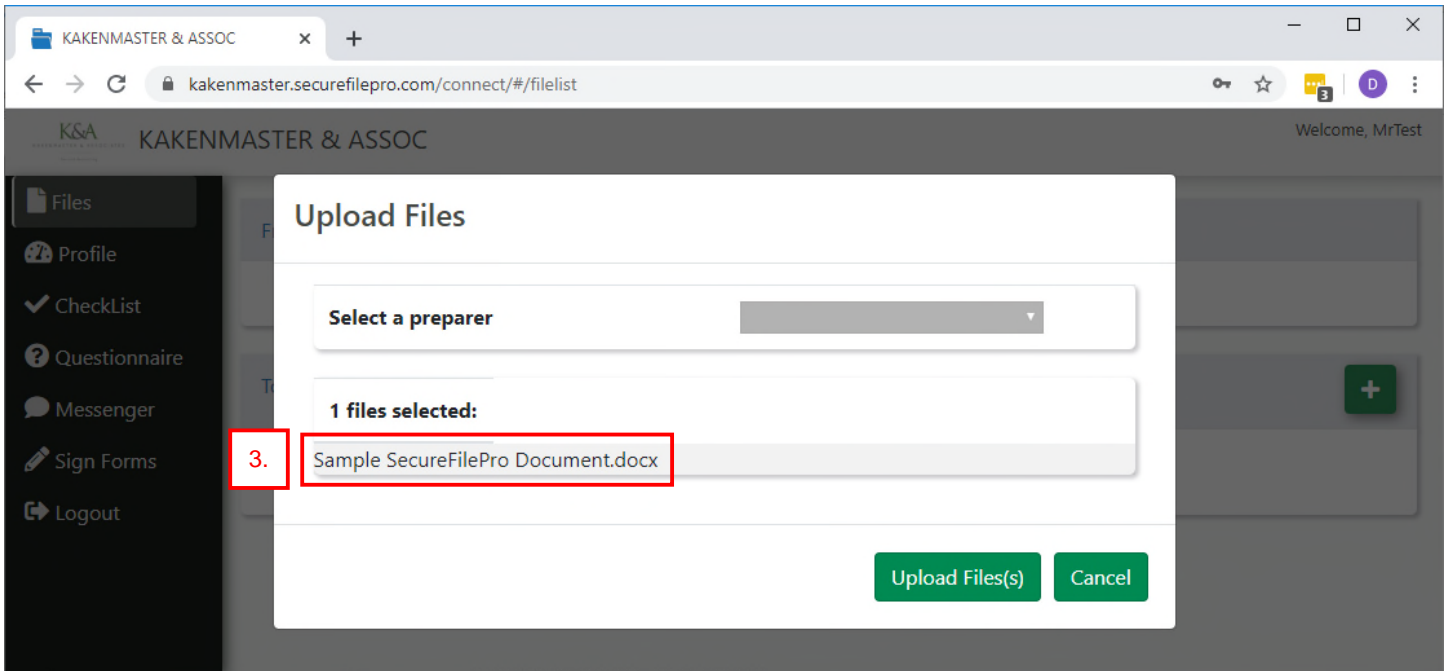
V. Submitting Documents to your Preparer

1. Login to SecureFilePro at <https://kakenmaster.securefilepro.com/connect/#/login>

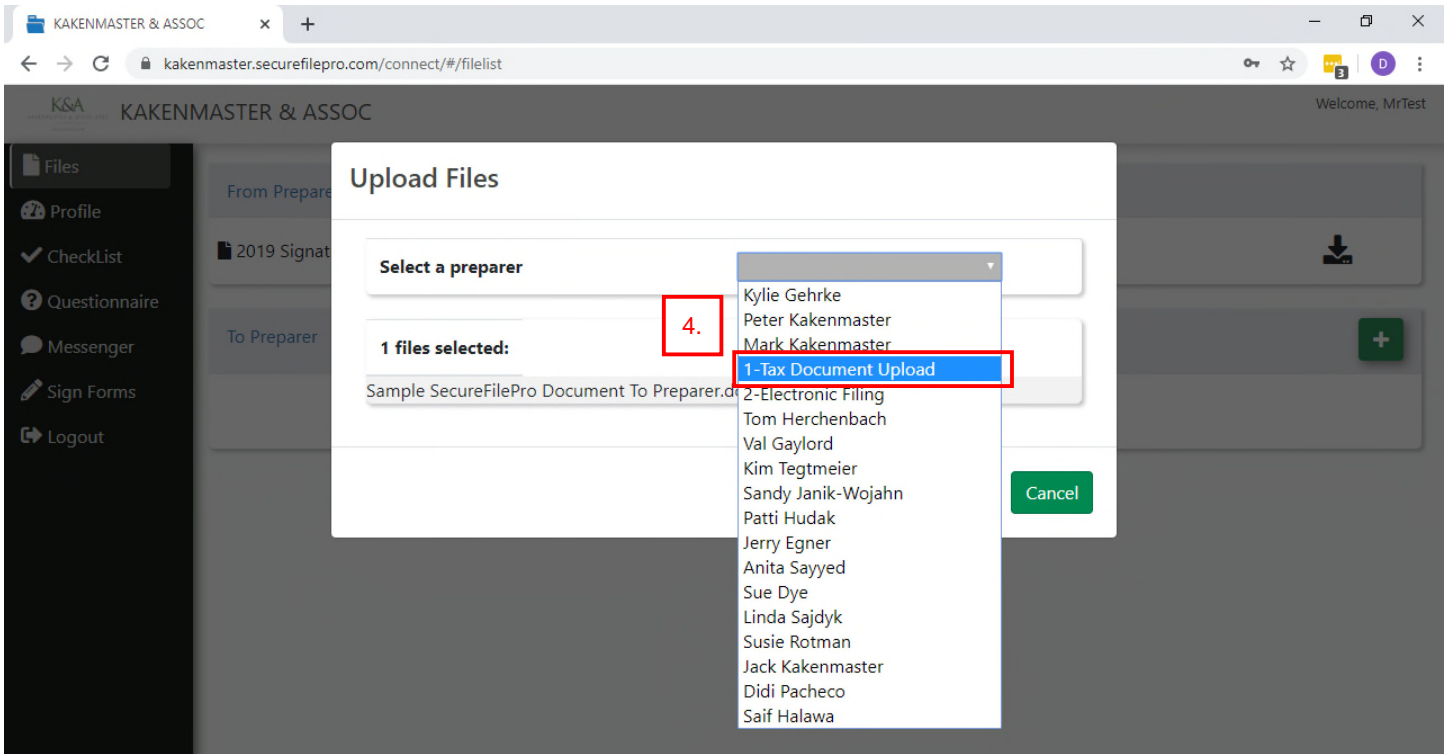
2. Click the **Upload File** button under the **To Preparer** section. An **Open** window will open.



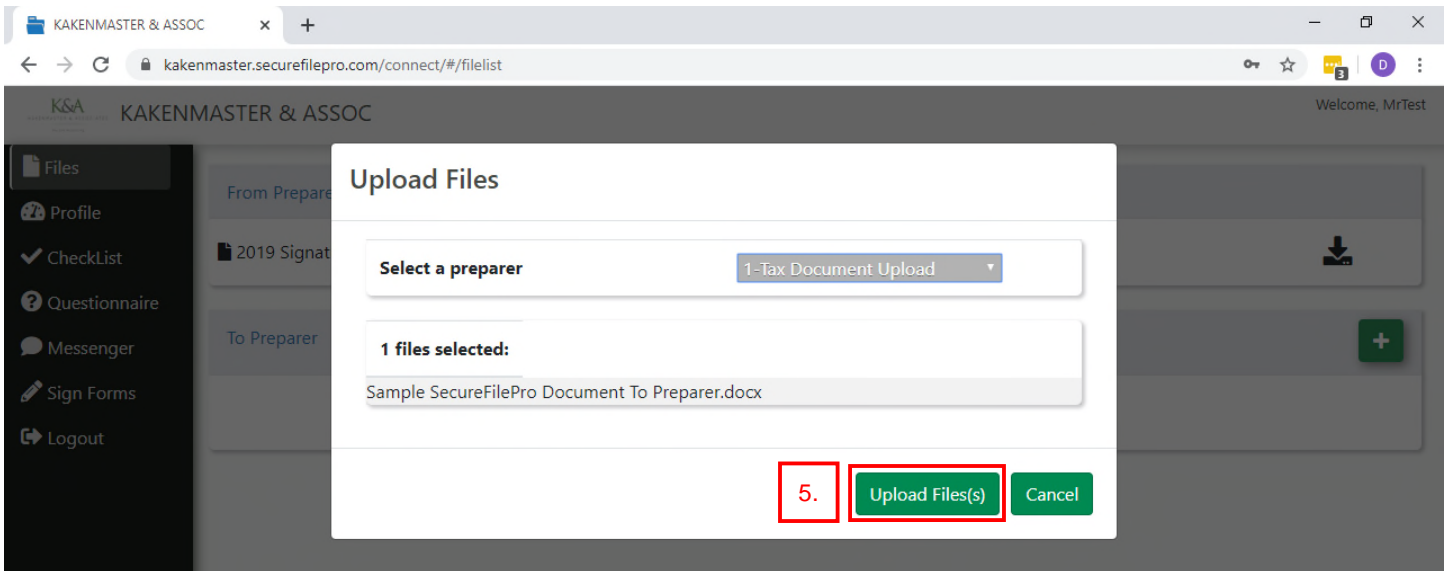
3. Navigate to the file(s) you would like to upload. Multiple files can be selected at one time by holding down the 'Ctrl' button. The selected file will be shown in the **Upload Files** screen under the **files selected**.



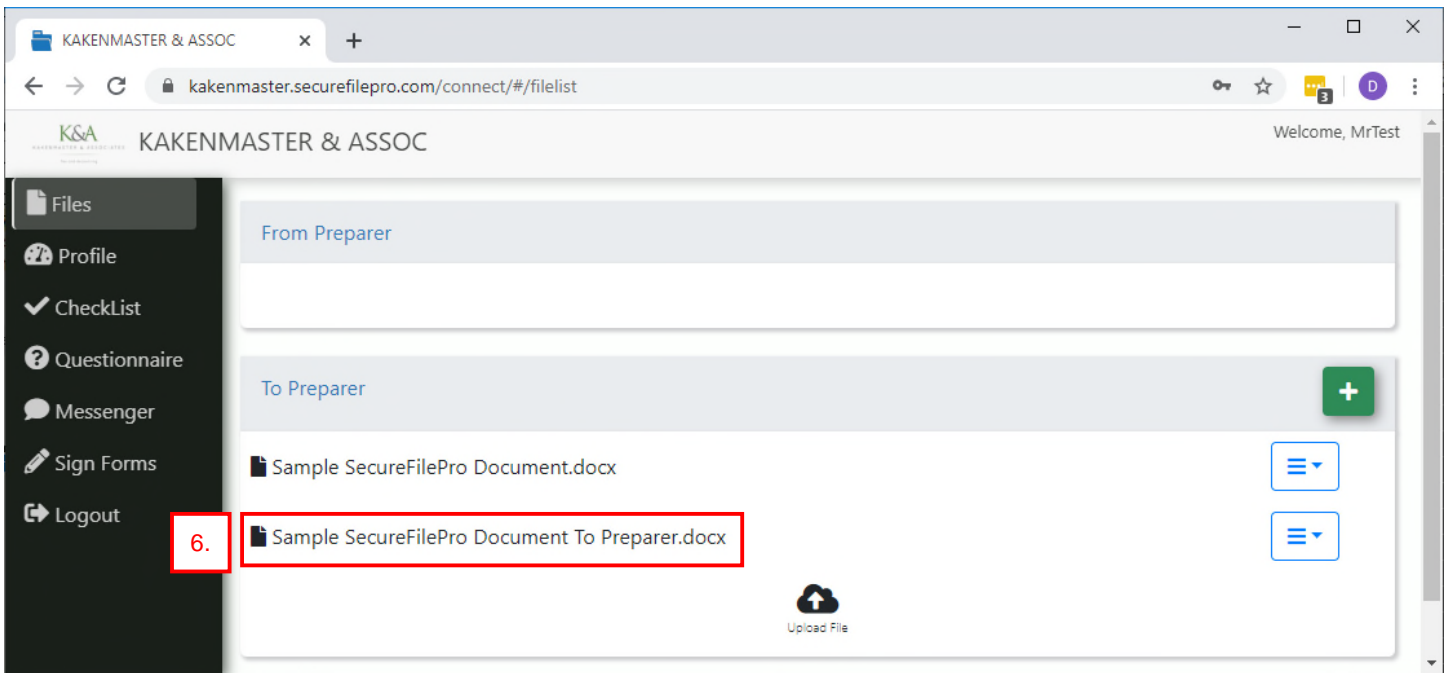
4. Use the **Select a preparer** drop down menu and select **1-Tax Document Upload***.



5. Click the **Upload File(s)** button.



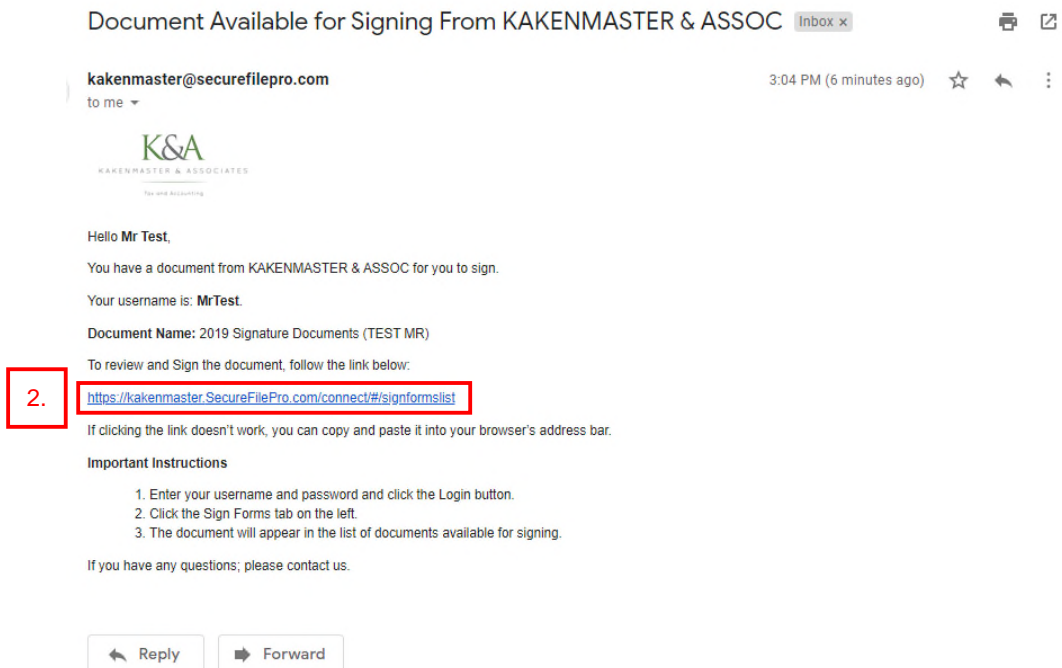
6. The uploaded file will display in the center window.



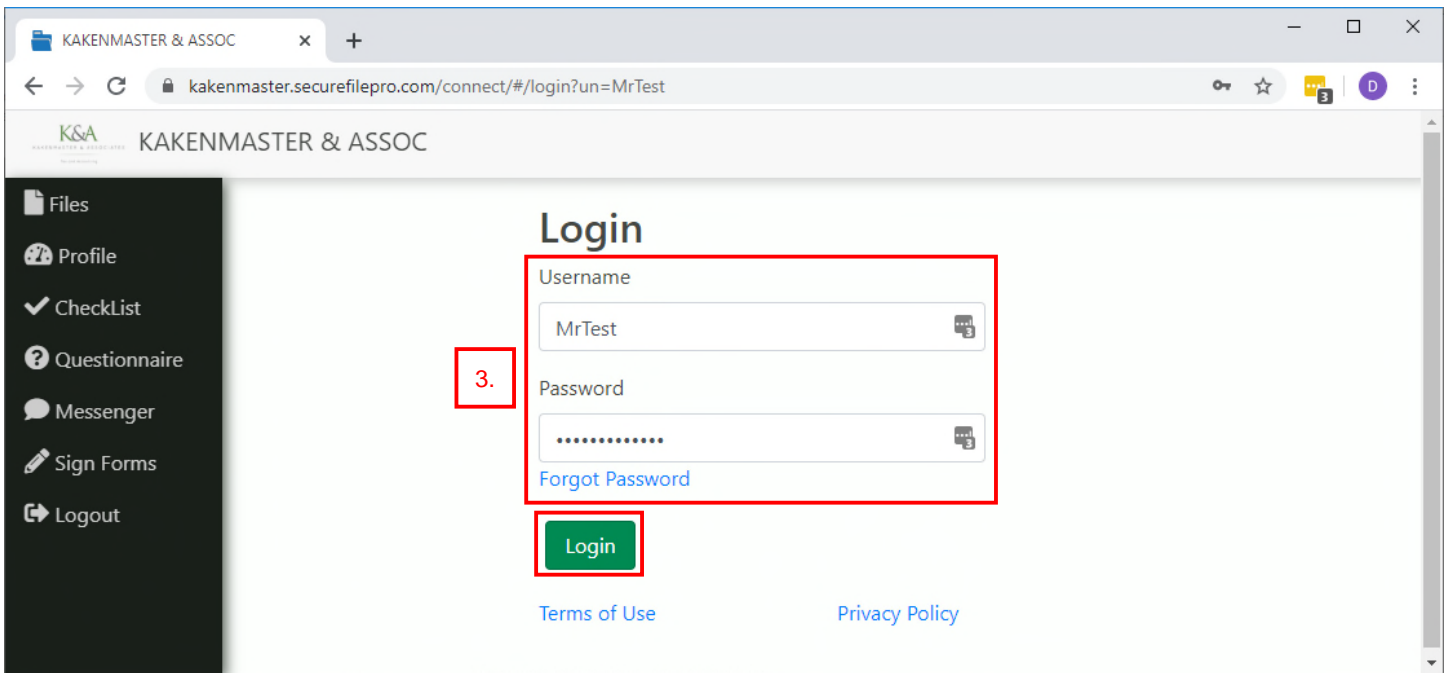
7. Your preparer will be notified that you have uploaded a file.

VI. Signing the Signature Documents Required for Electronic Filing

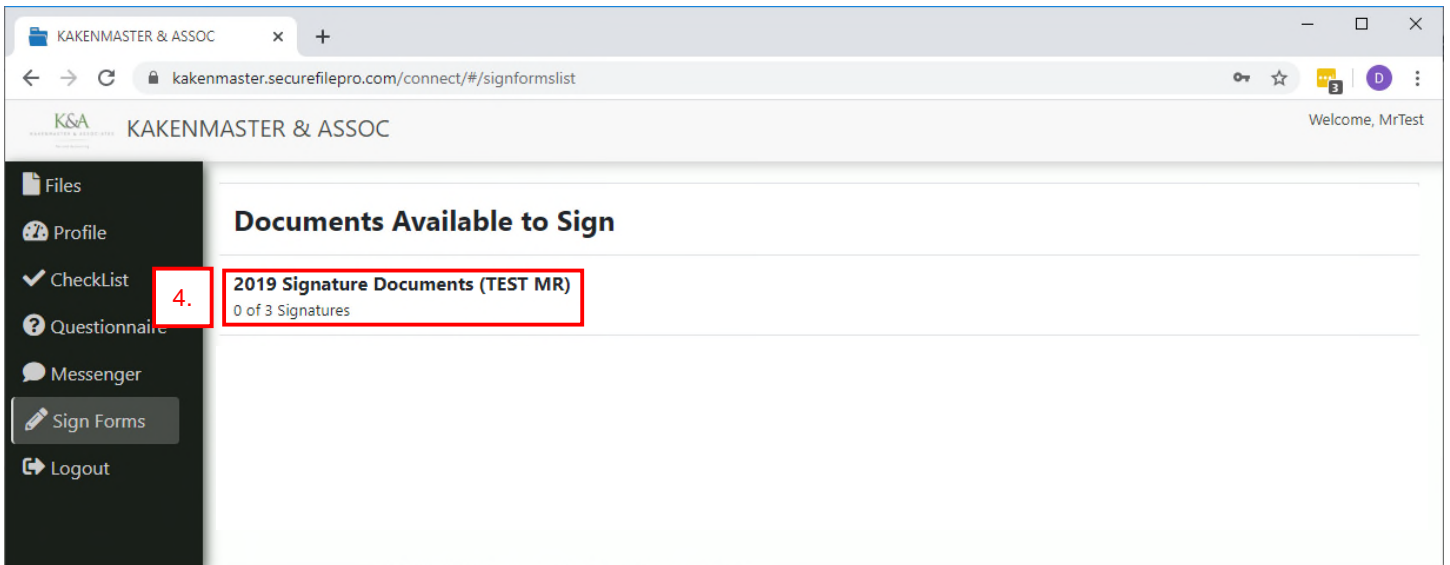
1. SecureFilePro Connect includes a **Sign Forms** feature for electronically signing the forms required for electronic filing. Please let your tax preparer know if you wish to sign remotely using SecureFilePro.
2. You will receive an email notification from kakenmaster@securefilepro.com with the subject "Document Available for Signing From KAKENMASTER & ASSOC". Click the link provided in this email to review and sign the document.



3. The **Login** screen displays. Enter your username and password and click the **Login** button.



4. The **Sign Forms** tab will display with your **Documents Available to Sign**. Click the **2019 Signature Documents** file.



- The first time that the taxpayer and spouse are presented with a document to sign, they are required to verify their identity through Knowledge-Based Authentication. A series of questions will be asked to confirm your identity. Answer each question and click “Next” to complete all questions.

Confirm Identity

At which of the following addresses have you lived?

- 5015 B U BOWMAN DR
- 1084 BPEACHTREE CT
- 510 ADAMS RD
- 3 CRESSING CT
- None of the above
- Skip Question

Question 1 of 5

5.

Next Cancel

- Use the Signatures button at the bottom of the screen to see a list of all forms that require signature and the page numbers. You can either click the signature pages from the Signatures window or use the front and back arrows to navigate through the pages. The required signature fields will be highlighted in yellow.

KAKENMASTER & ASSOC

kakenmaster.securefilepro.com/connect/#/signformslist

Welcome, MrTest

Files
Profile
CheckList
Questionnaire
Messenger
Sign Forms
Logout

← Back to List

1/1

IRS e-file Signature Authorization

Form 0019

Department of the Treasury
Internal Revenue Service

ERO must obtain and retain completed Form 8879.
Go to www.irs.gov/Form8879 for the latest information.

2019

Submission Identification Number (SID)

Taxpayer's name: MR TEST
Social security number: 423-45-6789

Spouse's name: _____
Spouse's social security number: _____

Part I Tax Return Information - Tax Year Ending December 31, 2019 (Whole dollars only)		
1	Adjusted gross income (Form 1040 or 1040-SR, line 8b; Form 1040-NR, line 35)	21,500
2	Total tax (Form 1040 or 1040-SR, line 16; Form 1040-NR, line 61)	933
3	Federal income tax withheld from Forms W-2 and 1099 (Form 1040 or 1040-SR, line 17; Form 1040-NR, line 62a)	2,100
4	Refund (Form 1040 or 1040-SR, line 21a; Form 1040-NR, line 73a; Form 1040-SS, Part I, line 13a)	1,167
5	Amount you owe (Form 1040 or 1040-SR, line 23; Form 1040-NR, line 75)	

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2019, and to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my immediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund, if applicable. I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

I authorize Kakenmaster & Associates, I to enter or generate my PIN 42696 as my signature on my tax year 2019 electronically filed income tax return. Enter five digits, but don't enter all zeros

I will enter my PIN as my signature on my tax year 2019 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature: _____ Date: _____

Spouse's PIN: check one box only

I authorize _____ to enter or generate my PIN _____ as my signature on my tax year 2019 electronically filed income tax return.

Signatures

Submit Signatures

6.

Name	Page	Signed
Kylie A Kakenmaster on Engagement Letter	2	
KYLIE A KAKENMASTER on 8879	3	
KYLIE A KAKENMASTER on IL8453	6	

- After reviewing the return, the taxpayer and spouse can click on the yellow signature fields and use a stylus, finger, or mouse to sign the forms that require a signature using the **Capture Signature** screen. Once complete, click **Save**.

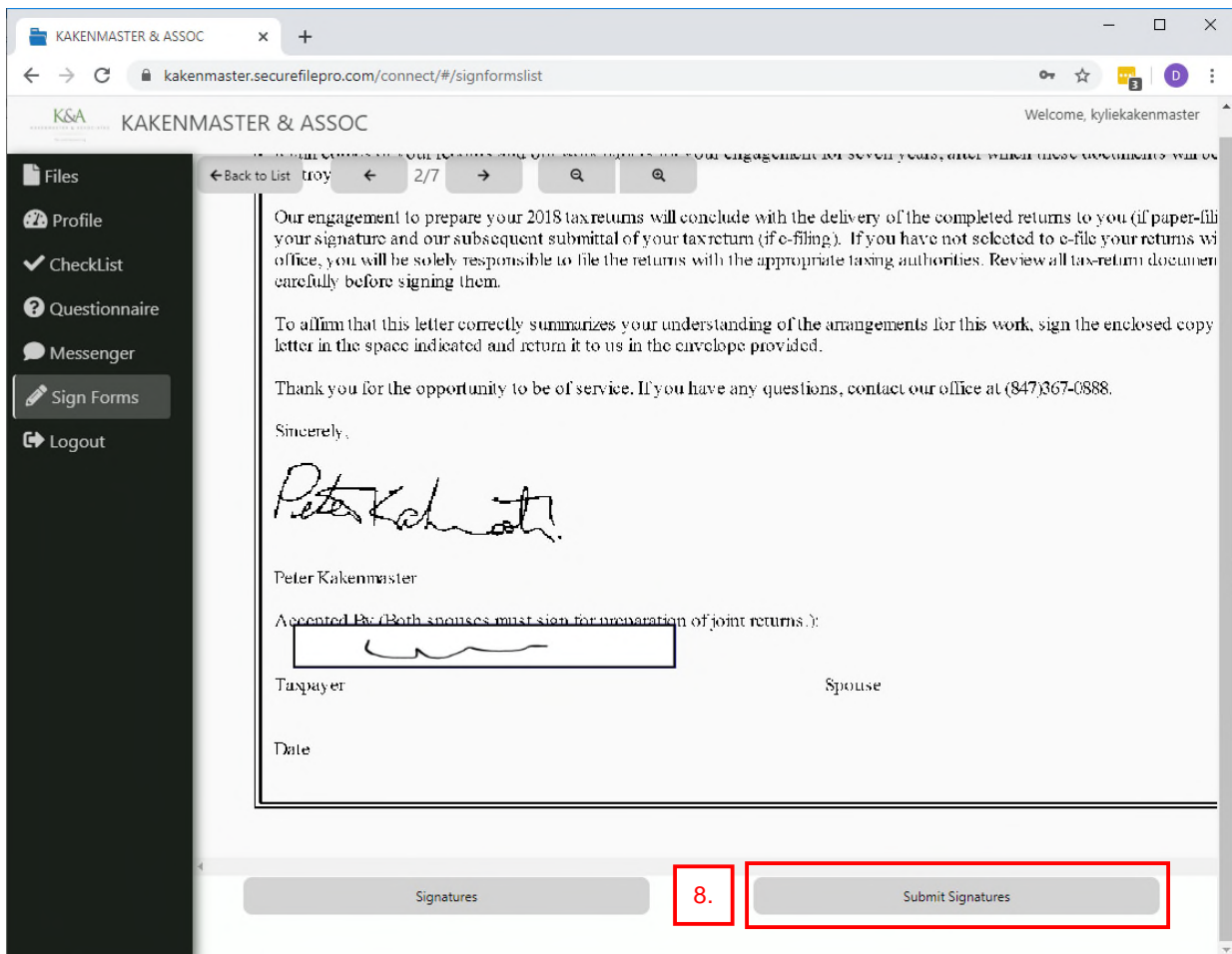
Capture Signature Clear

Signature: John Smith on 8879

7. 

Save Cancel

- After all signatures are complete, click Submit Signatures.



KAKENMASTER & ASSOC

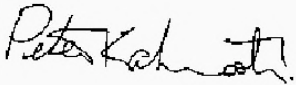
Welcome, kyliekakenmaster

Our engagement to prepare your 2018 tax returns will conclude with the delivery of the completed returns to you (if paper-file your signature and our subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax return documents carefully before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy letter in the space indicated and return it to us in the envelope provided.


Thank you for the opportunity to be of service. If you have any questions, contact our office at (847)367-0888.

Sincerely,



Peter Kakenmaster

Accepted By (Both spouses must sign for preparation of joint returns.):

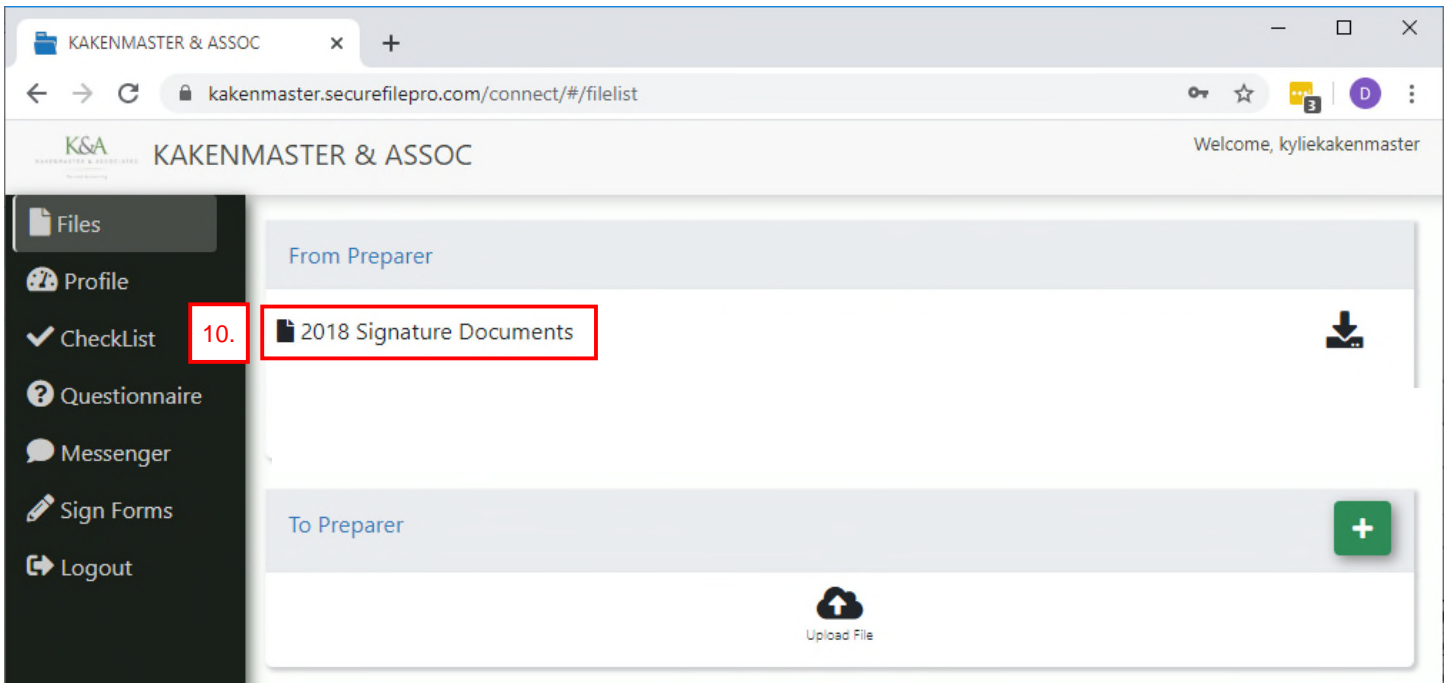


Taxpayer Spouse

Date

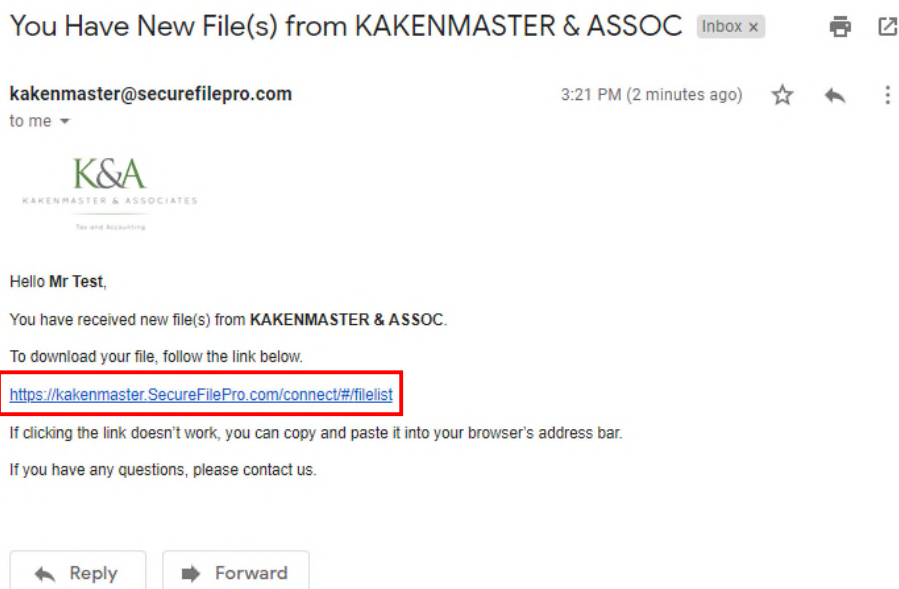
Signatures 8. Submit Signatures

9. Our office will be notified when the signatures have been submitted and will proceed with electronic filing. You will receive an email notification with the Federal return has been accepted.
10. A copy of the signed form will be available on the **Files** page and can be downloaded and saved for your records. Files in your SecureFilePro account will automatically expire and be deleted after 6 months.

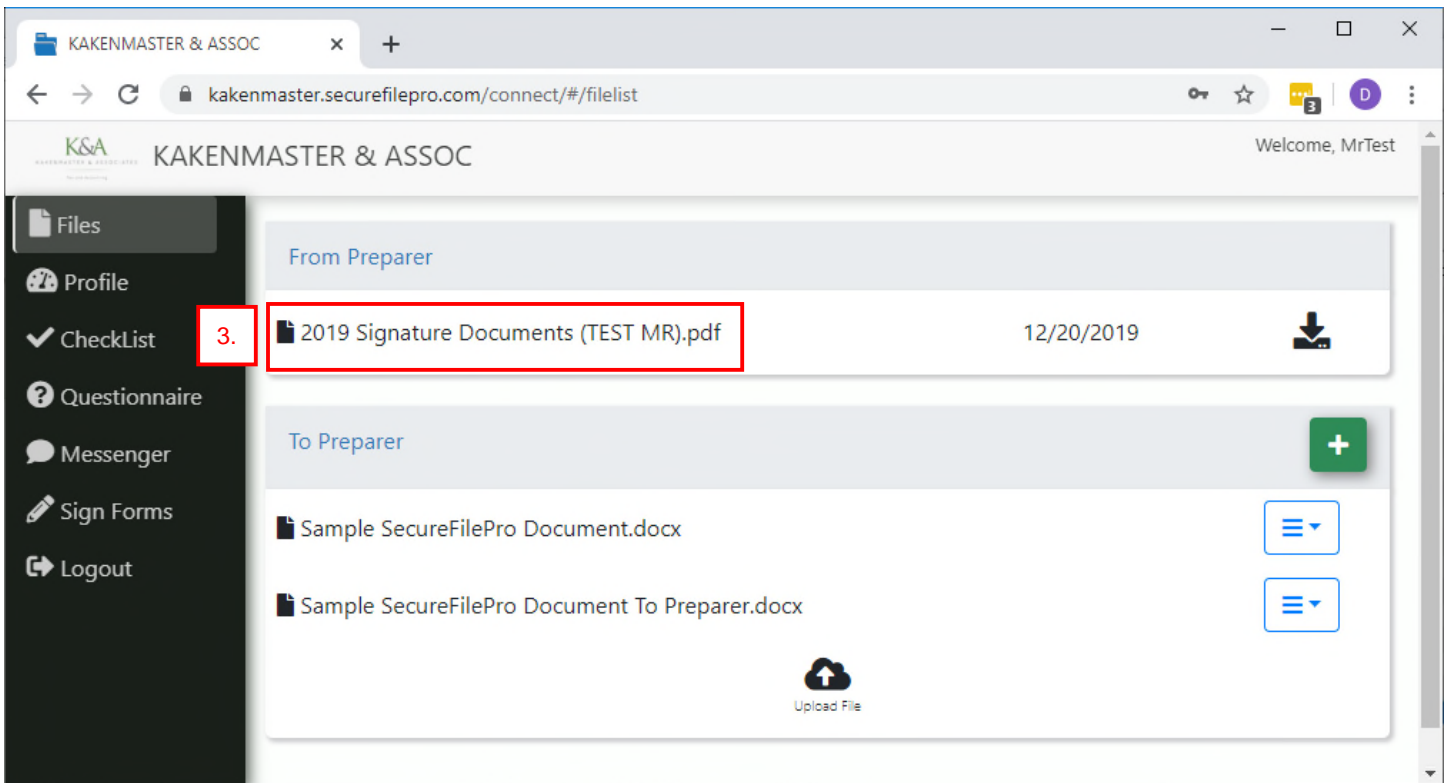


VII. Accessing documents from your preparer:

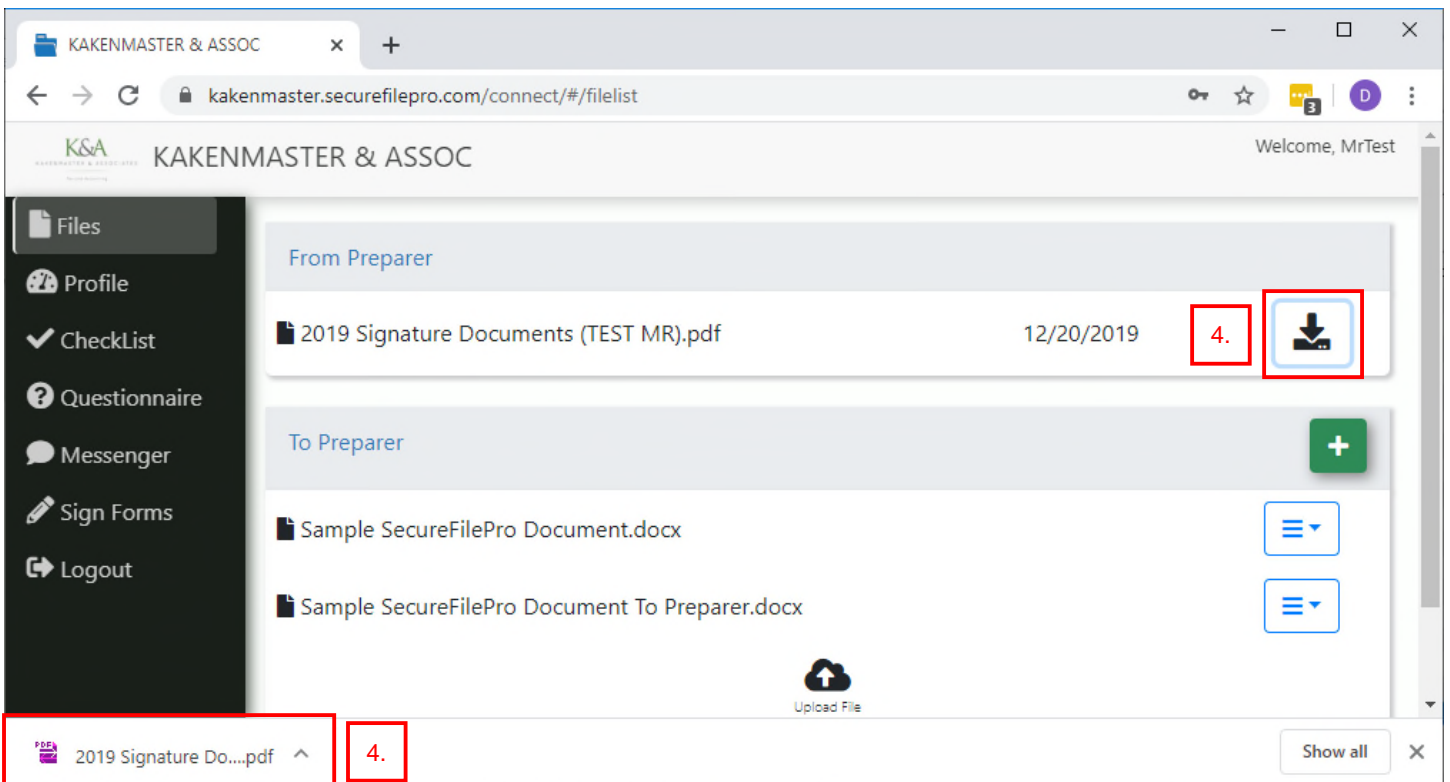
1. You will receive an automated email from kakenmaster@securefilepro.com when a file has been uploaded to the portal for your review.
2. Login to SecureFilePro Connect at <https://kakenmaster.securefilepro.com/connect/#/login> or use the link provided in the email.



3. On the **Files** window, your documents will appear under **From Preparer**.



4. Click the **Download Arrow** to open the document. The downloaded file will appear in the bottom left hand corner of the window. Click the file to open or save it.



5. Once the file opens, click the downward facing arrow to Save, then follow the normal procedure you use when saving a file to your computer. Files in your SecureFilePro account will automatically expire and be deleted after 6 months.

